Fall 2019 Syllabus
MBA 741.51: “Consulting Projects” Capstone Course (Day Section)
Classroom: Bryan 202

Instructor Information:

Faculty: Dr. Michael Beitler (pronounced Bite-ler)
Director of MBA Projects & Senior Lecturer
Office: Bryan 375
E-mail: mabeitle@uncg.edu *
*Do not leave messages for me on Canvas or send email messages to my business email account.

Office Hours: by appointment

Required Reading:
• Subscription to the Wall Street Journal: http://www.wsjuniversity.com/ ($15 for 15 weeks)

Suggested Readings & Resources:

• Prof. Garrett’s “Guidebook for Successful Business Writing”: pre-draft edition: D. Garrett-Guidebook

• Watch CNBC throughout the day (and “Shark Tank” in the evening). Students will be called upon without notice to share their insights in to current events in the business world.


Catalog Description:

Integration of tools and techniques of strategic analysis, formulation, and implementation of competitive and corporate strategy. Students engage in professional consulting with local organizations.

Course Prerequisites: MBA703, 706, 707, 708, 716 & 717
Course Corequisites: MBA703, 712
Electronic Devices:

Electronic devices are not permitted in class without permission from the instructor. All electronic devices (phones, laptops, tablets, etc.) must be out of sight until permission is received from the instructor. Only one warning will be granted; any student violating this policy after a warning will be dropped from the course.

Students are expected to show respect to whomever is speaking (faculty members, executive mentors, guest speakers, clients, fellow team members, and other teams).

Professional Behavior in the Classroom

Each class session will be run more like a staff meeting of a consulting firm rather than as a lecture-style class. Business-like behavior and professionalism is expected.

No political comments will be tolerated. Our goal as professionals is to add value for our clients, not to convert clients or fellow professionals to a particular ideology. Only one warning will be granted; any student violating this policy after a warning will be dropped from the course.

“Multiple Voices in My Head”: Faculty & Practitioner Resources

In this course, I have had students say, “I have multiple voices in my head.” I tell them, “I know a psychotherapist you can talk to.” They usually do not find that amusing, so I explain that there are multiple resources in this course. You need to know the role of each one.

1. Dr. Mike Beitler (see his bio at the end of this syllabus)

Dr. Beitler is responsible for the ultimate success of the course and the consulting engagements. He is responsible for overseeing the progress of the projects, facilitating classroom activities, and grading assignments.

2. Prof. Dianne Garrett (Business-Writing & Presentation Coach)

Prof. Garrett is available with her expertise in business-writing and presentation skills. She will offer valuable “feed forward” throughout the semester. “Feed forward” will be explained during the first class.

3. Executive Mentors (will be introduce during the second class session)

Each student-consulting team with have an executive mentor assigned to it to provide guidance throughout the project.

NOTE: Prof. Garrett will focus on “process”; your executive mentor will focus on “content.” Dr. Beitler will explain the process/content distinction early in the course. Understanding this distinction is critical to your success.
4. Your Team’s Client

You will be working with, and learning from, successful clients. I know they are looking forward to working you and being as cooperative as possible. But, keep in mind, they are paying for these projects, so they expect a professional presentation and an actionable, well-written report.

5. Steve Cramer (UNCG Business Librarian)

Mr. Cramer is available with his expertise in research & data mining. Once class session will be devote to this valuable resource.

6. Guest Speakers (for additional practitioner wisdom)

I will invite several guest speakers to class. They will provide practitioner guidance on general principles for your success, but may not (or may) be able to give specific guidance on your project.

**Academic to Business Writing**

In this course, you must use business-style writing. Business-style writing is different than academic-style writing.

Students in this course often say, with frustration in their voices, that I am requiring them to write with a style that is opposite of what they have been taught in the academic world. That is understandable because business-style writing and academic-style writing following very different formats. We talk about these differences in class.

If business-style writing is new to you, think of it as a new tool for your success. It’s similar to a carpenter with a hammer and screwdriver is his or her toolbox. Each has a different purpose. The key is to know when each tool should be used.

**Student Learning Outcomes (SLOs):**

Upon completing the course, the student should be able to:

1) Demonstrate integration of strategic analysis, strategy formulation and strategy implementation in an organization.
2) Assess the managerial activities to create sustainable competitive advantage for their companies.
3) Apply the tools of strategic and competitive analysis in the global business environment by analyzing a firm’s industry and strategy and developing recommendations.
4) Analyze the managerial task associated with formulating, implementing and executing company strategies and the actions managers can take to promote competent strategy implementation.
5) Synthesize the knowledge gained in a variety of different business and related courses, and the case discussions to provide a professional consulting advice to local organizations to solve a business problem in order to gain competitive advantage.

The Consulting Project is designed to fulfill SLOs 1, 2, 3, 4, and 5.

**Teaching Methods & Assignments for Achieving Learning Outcomes:**

The use of lectures, discussions, videos, exercises, and guest speaker presentations, as deemed appropriate. The "lecture" sessions will rely on the “Socratic” method to the extent possible. The descriptions of the assignments follow in this document.

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**GRADED ASSIGNMENTS - Day Section (741.51)**

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Individual</th>
<th>Team</th>
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<tbody>
<tr>
<td>Success-Panel Reflection Memo</td>
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<tr>
<td>“Best Draft”</td>
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<tr>
<td>Finalization Submission</td>
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<tr>
<td>Myers-Briggs Team-Building Exercise</td>
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<tr>
<td>Current Events Team Presentation</td>
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<td>7.5%</td>
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<tr>
<td>Statement of Work (SOW)</td>
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<td>12.5%</td>
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<tr>
<td>“Best Draft”</td>
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<tr>
<td>Final</td>
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<tr>
<td>Gantt Chart</td>
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<td>Industry &amp; Market Research &amp; Analysis</td>
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<td>5%</td>
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<tr>
<td>Final Written Report for Client</td>
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<tr>
<td>Executive Summary</td>
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<tr>
<td>“Best Draft”</td>
<td>15%</td>
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<tr>
<td>Final Document</td>
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<td>5%</td>
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<tr>
<td>Project Presentation</td>
<td></td>
<td>25%</td>
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<tr>
<td>Contribution to the Team</td>
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<td>5%</td>
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<tr>
<td>Engagement in the Class</td>
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<td>5%</td>
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<tr>
<td><strong>Totals</strong></td>
<td><strong>20%</strong></td>
<td><strong>80%</strong></td>
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</table>
1. “Success Panel” Reflection Memo (“Best Draft” & Finalized) (-0-% + 5%)

During the first half of the second class, Dr. Beitler will facilitate a “Success Panel” discussion with the executive mentors, in which he will draw out the executive mentors’ vast knowledge and experience from the business world.

Each student must take notes during the panel discussion. These notes will become the basis for writing a reflection memo about what the executive mentors shared about leadership and success in the business world.

A “best draft” of the reflection memo, addressed to Professor Garrett, must be uploaded to Canvas. Since business-style writing is Prof. Garrett’s area of expertise, she will critique your memo on Canvas. Use her “feed forward” to help you prepare your finalized version. Dr. Beitler will grade both the “best draft” and finalized versions.

2. Myers-Briggs Team Building Exercise (5%)

One class will be devoted to emotional intelligence (self-awareness and other-awareness), in which Dr. Beitler will lead a discussion and exercises using the Myers-Briggs Type Indicator (MBTI). To earn the points for this assignment, the student must submit his/her results (4 letters and 4 numbers) from the online MBTI assessment by the due date on the Schedule of Classes & Assignments.

3. Current Events Team Presentation (7.5%)

Each team will be given a date to make a presentation about a significant current event in the business world. At the end of the formal presentation (with PowerPoint or some other presentation software), the team is responsible for leading a Q&A.

Prof. Garrett has offered to provide “feed forward” on your team’s PowerPoint slides. Email your PowerPoint slides to her long enough before your presentation to get her suggestions. NOTE: Any political comments during the presentation will result in a grade of zero for the team.

4. Statement of Work (“Best Draft” & Finalized) (5% + 7.5%)

A key component in the practice of consulting is the creation of the Statement of Work (SOW). It is a written agreement between the consulting team and the client that clearly states the project’s intent, expectations, protocols, timelines, and deliverables.

The first consulting project deliverable for this course is a finalized, signed SOW. Student-teams are expected to meet with their clients to discuss the project before creating an SOW.

After creating its SOW, each team must upload (to Canvas) its “best draft” to Dr. Beitler and Professor Garrett for “feed forward” for the team to use in preparing its “finalized” version.

Before the finalized version of the SOW is presented to the client for signature, each student-team must secure an approval from the instructor and the executive mentor (to avoid over-commitment by the team).
5. **Gantt Chart (5%)**

Each team must upload a Gantt Chart to Dr. Beitler. The Gantt Chart provides a visual of what must be done and when during the project. Dr. Beitler will share examples of Gantt Charts in class.

6. **Industry & Market Research & Analysis (5%)**

The Industry & Market Analysis must be prepared by each team in preparation for the “State of the Project” discussion with its executive mentor. It is strongly advised that each team spend time with Steve Cramer (the UNCG Business Librarian) when researching and preparing its Industry & Market Analysis.

7. **Written Project Report (Executive Summary, “Best Draft,” & Final Report) (5%+15%+5%)**

The written report is a critical component of the consulting project as it represents the final recommendations of the team to the client. Each team’s report must contain an executive summary describing the key recommendations. The main body of the report will describe the recommendations in detail and be heavily data-driven. Be sure to meet the deadlines for submitting the executive summary, “best” draft, and final written report.

The report is expected to be a professional piece of work, presented clearly and concisely, free of grammatical, spelling, or syntax-related errors. The final written report should be handed to the client at the conclusion of the oral presentation.

The analysis should be of original thought. Therefore, no more than 20% of the final document submitted should be references from citations used (including charts/graphs). Exceeding this limit will negatively impact your grade significantly.

Each student-team is required to submit a “best draft” of the team’s written report. The finalized written report, utilizing Prof. Garrett’s “feed forward,” must be a finished product and will be graded for the quality of work focusing on format (business style), content, and grammatical composition.

**NOTE:** Each team must provide the MBA Office with a copy of the finalized document. Read the section of the syllabus entitled “Reimbursable Expenses” for details.

8. **Oral Presentation (25%)**

Each consulting team will make a formal presentation to the client on a date and time to be determined, near the end of the semester. The student-teams are responsible for scheduling the presentation date and location. All team members are expected to participate evenly in the presentation.

Presentations may be made at the Bryan School or the client’s location and should include no more than 30 minutes for the formal presentation and 30 minutes for questions and answers. Presentations are expected to include the use of visual tools (PowerPoint, Prezi, etc.). Be sure to get “feed forward” from Prof. Garrett and your team’s executive mentor.

Any delays in completing the oral presentation may, at the instructor’s discretion, result in a grade penalty.
*Important Note: Grading of the document and presentation is team-based, but the instructor reserves the right to individually grade team members if, at his sole discretion, it is warranted due to lack of participation or effort by individual team members. The instructor will consider comments from the individuals’ team members in determining final grading. In that case, it is possible for team members to earn different grades for both assignments.

9. **Contribution to the Team (5%)**

Points for the individual student’s contribution to the team will be determined by the student’s teammates.

The successful completion of a high-quality consulting project requires a great deal of work and cooperation across team members. For this reason, team members will determine a portion of each student’s course grade based on their assessment of the student’s contribution to the team and the project’s success.

10. **Engagement in the Class (5%)**

Points for the individual student’s engagement in the class will be determined by the instructor.

The instructor will consider the following:
- contributing to class discussions
- being “present” (not just physically) during class
- asking questions of the guest speakers
- being sure the team submits slides to Prof. Garrett for “feed forward”
- offering suggestions to the instructor before or after class
- contributing value to the “round robins” at the end of class sessions

**“Firing” Team Members**

This section applies to all team activities.

In every teamwork situation, “people” issues appear. Yet, in today’s business environment, effective team “knowledge work” has become a competitive advantage. You are/will be required to work effectively with people of different skill levels, interests, and motivations to succeed in this course and in your career.

**“Firing” Process:** In the case where a team member consistently underperforms, action can be taken by the team, in sequential steps, as follows (underperformance includes but is not limited to missing scheduled meetings, not completing agreed-upon assignments in the time required, etc.):

1. Team members meet with the underperformer(s), discuss the issues and clearly delineate the expectations of the team. This meeting is documented and the notes of such are sent to Dr. Beitler.
2. If, after a reasonable period of time, determined by the team, performance does not improve, the team can request a meeting with Dr. Beitler to discuss the issues at hand. At that time, Dr. Beitler will request a meeting with the underperformer(s).
3. After such meeting and a reasonable amount of time to correct the issues has passed, the team will be given the authority to “fire” the under-performer(s), with the approval of Dr. Beitler (supporting “just cause”).

If a student is “fired” from a team, he/she will receive a score of zero (0) for the entire consulting project and will fail the course, regardless of other scores earned in the class. No make-up work is available to counteract this failing.

**Class Attendance**

Class attendance alone will **not** earn contribution credits. However, poor attendance will lower your contribution grade. You cannot contribute if you are absent from the class.

There are **no** “excused absences” in this class (for work-related activities, illnesses, or otherwise). Each missed class will affect your contribution grade.

More than **three** absences will result in a failing grade for the course, regardless of your contribution to your team and class during the semester.

NOTE: The instructor reserves the right to accept a late submission. If so, the instructor reserves the right to deduct grade points for each late submission(s) accepted.

**Reimbursable Expenses:** Pertaining to your consulting engagement:

1. **Travel**

Students are expected to meet with their clients throughout the project. The Bryan School will reimburse students for mileage expenses for teams whose client’s principle location for the project is greater than 15 miles one way from the school. TRV-1 and TRV-S forms must be submitted one week before travel, and reimbursement will be for **one vehicle per team**, per visit. Please submit claims to Sara Pilling (slpillin@uncg.edu).

The TRV-1 and TRV-S form can be found here: [http://acb.uncg.edu/accounting-forms/](http://acb.uncg.edu/accounting-forms/).

- For the TRV-1: Fill out the top "Travel Authorization" portion of the form and sign/date in the two places indicated for "Traveler's Signature."
- If you are a non-resident alien, you must also complete the Foreign Visitor Information (NRA-001) Form. Please send Sara this completed form with **all supporting documents** listed at the top of the form. The NRA-001 can be found here: [https://payroll.uncg.edu/wp-content/uploads/2016/03/NRA001-Foreign-Visitor-Form-Rev-3-16.pdf](https://payroll.uncg.edu/wp-content/uploads/2016/03/NRA001-Foreign-Visitor-Form-Rev-3-16.pdf)

2. **Copies of Finalized Written Reports**

a) The MBA Office will be collecting electronic PDF copies of all reports. One student from each team will need to ensure a finalized copy is sent to the MBA Office by the day of the oral presentation. Please email this electronic copy to Sara Pilling ([slpillin@uncg.edu](mailto:slpillin@uncg.edu)).

b) It is expected that each team will present a final printed copy of their report to client representatives at the presentation. If needed, the MBA office will reimburse for **two** printed and bound copies of your report. **We recommend contacting Spartan Printing** for fast and cost-efficient printing, but will also reimburse for off-campus printing from FedEx, Staples, Office Depot, etc.

If you are seeking reimbursement for the printing and binding costs of **two** reports that you purchased on a personal credit/debit card:
- Please contact Sara for assistance with reimbursements. You will need to provide an original receipt from where you got the reports printed (Spartan Printing, FedEx, Staples, etc). This must be a receipt received after payment is complete – an order summary or statement of work is not an acceptable receipt.

- With the receipt, please also provide a note with your name, student ID number, and address to send reimbursement payment to.

**Evaluation/Grading Descriptions:**

**A = Excellent:** indicates achievement of distinction. Student(s) exceed expectations and requirements as stated in the “Student Learning Objectives –SLO’s”. Completed work is of exceptional quality in the eyes of the instructor. The work demonstrates a clear understanding of the material under study, including materials and knowledge gained from previous class work, as well as a superior ability to articulate the material.

**B = Good:** indicates general achievement superior to the acceptable standard of performance. The work demonstrates a solid understanding of the work under study and is prepared and presented effectively, with very few errors or omissions.

**C = Average:** indicates the acceptable standard for meeting the course requirements. Work demonstrated a minimal understanding of the theory, application and/or concepts needed to successfully complete the assigned project(s). Work completed did not meet the expectation of the instructor and/or client company.

**F = Failure:** indicates failure to perform to a minimum standard of performance. Work was not completed in a timely manner, or lacked little comprehension of the materials taught during the MBA program. Included here is the lack of participation of the student to any of the team-based projects.

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<thead>
<tr>
<th>Grade</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>A</td>
<td>94% - 100%</td>
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<tr>
<td>A-</td>
<td>90% - 93.9%</td>
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<tr>
<td>B+</td>
<td>88%-89.9%</td>
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<tr>
<td>B</td>
<td>80%-87.9%</td>
</tr>
<tr>
<td>C</td>
<td>70-79.9%</td>
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<tr>
<td>F</td>
<td>Below 70%</td>
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*Note: Instructor reserves discretion to round fractions up or down to a whole number percentage.*

**General:**

**ACADEMIC HONOR CODE:**

By the singular act of registering for this course, you are agreeing to abide by the UNCG Academic Integrity Policy. All written work submitted must be original and produced by the student/team for this class only. If you are for any reason unfamiliar with the contents of the code, please review it on the school’s website link: [http://academicintegrity.uncg.edu/complete/](http://academicintegrity.uncg.edu/complete/). Violations will be pursued.

Academic Integrity applies to all aspects of MBA741. Please be aware that the following also constitute Integrity Violations in MBA741:
• Signing an attendance sheet for another student and/or failing to attend the entire class is a falsification of your attendance and an academic integrity violation.
• Falsification of any material used in the preparation or development of assignments is a code violation.

The Bryan School of Business and Economics has recently developed and accepted Faculty and Student Guidelines focusing on the expected performance of each. Since these guidelines are new, please take the time to review them. They can be found at the following link:

**Students with Disabilities:** UNCG seeks to comply fully with The Americans with Disabilities Act and section 504 of the Rehabilitation Act of 1973. Students requesting accommodations based on a disability must be registered with the Office of Disability Services in 215 Elliott University center, 334-5440, [www.uncg.edu/ods](http://www.uncg.edu/ods).

**Inclement Weather:**

UNCG will remain open during adverse weather conditions until and unless the Chancellor makes the administrative decision to postpone/cancel class. Students can obtain details on those decisions by calling the Adverse Weather Line at 336-334-4400 or accessing the website at: [www.uncg.edu/iss/weather.htm](http://www.uncg.edu/iss/weather.htm).

**Extra Credit:**

There are no extra credit assignments scheduled for this course. If a situation presents itself during the semester, all students will be given equal opportunity to participate.

**Instructor’s Brief Biography**

Dr. Mike Beitler (pronounced Bite-ler) began his career as a CPA with one of the Big-4 CPA/consulting firms in Baltimore. He then worked as a Chief Financial Officer in banking for 10 years.

After teaching a few evening courses, Mike decided to go to graduate school to earn his masters degree and Ph.D. (Leadership Development).

Dr. Beitler is a long-time faculty member in The Bryan School, where he has taught a wide range of courses, including Strategic Planning, Leadership Assessment & Development, and Organizational Behavior. He has authored two popular business books: “Strategic Organizational Change” and “Strategic Organizational Learning.”

Dr. B continues to work in the business world as an executive coach, leadership team trainer, and as a strategic planning facilitator.

Mike is actively involved in the Triad Coaching Connection and the Institute of Management Consultants. He is happily married with three adult children. Mike is a mindfulness and meditation practitioner.
## Tentative Schedule of Classes & Assignments: Fall 2019 (Day Section)

Wednesdays (2pm – 4:50pm) in Bryan 202

Note: Instructor reserves the right to change topics, assignments, and/or due dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Assignments (due on this date)</th>
</tr>
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<tbody>
<tr>
<td>1</td>
<td>8/21</td>
<td>“Consulting Projects” Course Overview</td>
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<tr>
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<td>Interviewing Skills – Active Inquiry - Dr. Beitler</td>
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<td>Initial Team Work</td>
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<td>2</td>
<td>8/28</td>
<td>* Executive Mentors – “Success” Panel</td>
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<td>“” -- Work with Individual Teams</td>
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<tr>
<td>3</td>
<td>9/4</td>
<td>Academic-to-Business Transition (Writing &amp; Presentations) – Prof. Garrett</td>
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<td>Reflection Memo Feedback – Prof. Garrett</td>
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<td>Creating the SOW Document – Dr. Beitler</td>
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<tr>
<td>4</td>
<td>9/11</td>
<td>Research Support Available - Steve Cramer</td>
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<td>Discussion of SOW Documents – Dr. Beitler</td>
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<td>Creating the Gantt Chart – Dr. Beitler</td>
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<td>5</td>
<td>9/18</td>
<td>* Executive Mentors -- Work with Individual Teams</td>
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<td>Process Consulting – Dr. Beitler</td>
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<td>6</td>
<td>9/25</td>
<td>MBTI Team Building Exercises – Dr. Beitler</td>
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<td>Emotional Intelligence Discussion – Dr. Beitler</td>
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<tr>
<td>7</td>
<td>10/2</td>
<td>Guest Speaker – Gary Fly</td>
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<tr>
<td>8</td>
<td>10/9</td>
<td>Guest Speaker – Lizzy Tahsuda</td>
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<td>“Check In” with Executive Mentors</td>
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<tr>
<td>9</td>
<td>10/16</td>
<td>Guest Speaker – Abhiroop Dutta</td>
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<tr>
<td>1</td>
<td>10/23</td>
<td>Guest Speaker – Joe Erba</td>
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<tr>
<td></td>
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<td>Strategy Revisited – Dr. Beitler</td>
</tr>
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</table>

Subscriptions to Wall Street Journal  

“Best-Draft” Reflection Memo - Uploaded to Canvas  

Team #1 Current Events Presentation  

“Finalized” Reflection Memo Uploaded to Canvas  

“Best Draft” Statement of Work (SOW) – Uploaded to Canvas  

Team #2 Current Events Presentation  

Gantt Chart Uploaded to Canvas & Ready for Executive Mentors  

“Finalized” SOW Uploaded to Canvas & Ready for Executive Mentors  

(Note: SOW with Client Signature emailed to Dr. Beitler by 5pm on Sept. 23.)  

MBTI 4 Letters & 4 Numbers emailed to Dr. Beitler by Sept. 22 @ 11:59pm  

Team #3 Current Events Presentation  

Team #4 Current Events Presentation  

Team #5 Current Events Presentation  

Team #6 Current Events Presentation  

Team #7 Current Events Presentation
<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/30</td>
<td>* Executive Mentors -- Work with Individual Teams “State of the Project” Discussion</td>
<td>Industry/Market Analysis ready for Executive Mentors (NOTE: Industry/Market Analysis Uploaded to Canvas by 11:59pm October 31.)</td>
</tr>
<tr>
<td>11/6</td>
<td>Developing the Client Document &amp; Presentation – Prof. Garrett 1 Team Practice Presentation *Executive Mentor Attends</td>
<td>Executive Summary Uploaded to Canvas</td>
</tr>
<tr>
<td>11/13</td>
<td>3 Team Practice Presentation *Executive Mentor Attends</td>
<td>“Best Draft” of Client Document Uploaded to Canvas</td>
</tr>
<tr>
<td>11/20</td>
<td>2 Team Practice Presentations * Executive Mentors Attend</td>
<td>“Finalized” Written Document Uploaded to Canvas</td>
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<tr>
<td>12/4</td>
<td>2 Team Practice Presentations * Executive Mentors Attend</td>
<td></td>
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<tr>
<td>11/18 thru 12/12</td>
<td>Presentations to Clients * Executive Mentors May Attend with Teams</td>
<td>Final Document Due to Client at the End of the Presentation to the Client</td>
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